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ABSTRACT

An employer survey was conducted by California's Crafton Hills College (CHC) to determine the skills, aptitudes, or personal qualities potential employers most wanted to see in applicants for clerical/secretarial positions. Questionnaires were distributed and personal interviews conducted with 50 supervisors, selected to represent typical employers of CHC students. Respondents were asked about the skills or qualities required or desired for clerk-typists and secretaries, areas of performance in which improvement was needed, causes of employee termination, and sources of employees. Study findings included the following: (1) more than 50% of the respondents felt that filing, typing, general office skills; spelling and grammar skills; telephone skills; interpersonal skills; and the ability to maintain confidentiality were requirements for clerk typists; (2) secretarial skills differed sharply from those for clerk-typists, with the most important required or desired skills being administrative ability, communication skills, general office skills, and organizational ability; (3) respondents felt that improvement was needed in applicants' and employees' ability to write and speak effectively, capacity to manage their time, and pride in the quality of their work; and (4) the leading causes for termination were absenteeism, inability to get along with co-workers, and frequency of costly mistakes. Employer comments and recommendations for the improvement of CHC's secretarial programs are included in the report. (EJV)

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QUALITIES AND SKILLS EMPLOYERS LIKE AND DISLIKE IN CLERICAL WORKERS

An Office Administration Survey

by

Virginia M. Gaustad, Professor Emeritus

Crafton Hills College

March 30, 1988

IC 880 202

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PURPOSE OF THE SURVEY

The Office Administration Program at Crafton Hills College seeks to serve the surrounding communities by supplying potential employers with secretaries whose skills best meet their needs. In this way we also, of course, render greatest service to our students who are seeking employment after earning a certificate or degree in Office Administration.

To that end, the Dean of Occupational Education authorized a survey to determine those skills or aptitudes or personal qualities potential employers were most interested in finding within any applicant pool. What skills would they rank highest? What training would they value most? What types of individuals were they looking for?

From December 1987 through February 1988, I surveyed 50 people who are actively involved with hiring or supervising personnel in the Yucaipa, Redlands, San Bernardino, Riverside, and Loma Linda areas. Questionnaires were distributed and personal interviews conducted with all participants. By follow-up, either with a return visit or a telephone call, I managed to obtain a 100% return of the questionnaires. In addition to receiving information that lends itself to statistical summary, I received many informal and unstructured comments that will be noted later in the responses to the survey.

The supervisors chosen to participate are representative of those that employ students who have been trained in the program at Crafton Hills College. In every instance I talked personally with the people surveyed. And in every instance, they were very supportive and were interested in the findings.

A list of the participants and the results of the survey are attached. The questionnaire addresses five specific issues:

1. Skills or qualities required or desired for a clerk-typist;
2. Skills or qualities required or desired for a secretary;
3. Areas in which improvement is needed for clerk-typists and secretaries;
4. Causes for employees being terminated; and,
5. Sources for obtaining employees.

My evaluation of the results of the survey and recommendations for the Office Administration Program will follow the statistical data.

QUESTIONNAIRES SENT TO THE FOLLOWING PARTICIPANTS

Office Administration Advisory Committee, Crafton Hills College

Rosemary Bedoya, Career Planning, CHC
Judy Bryld, Personnel Director, Yucaipa Unified School District
Freya Foley, Personnel Analyst, San Bernardino County Personnel Office
Mary Harding, Administrative Officer, Psychiatry, VA Medical Center
Gwen Marino, Chair, Business Department, Yucaipa High School
Vi Neuman, Counselor, CHC
Lorrie Poyzer, City Clerk, Redlands
Susan Staudt, Business Instructor, Yucaipa High School
Joan Macey, Instructor, Office Administration, CHC
Susan Vajna, Instructor, Office Administration, CHC
Ron Kibby, Dean, Occupational Education, CHC

CHC Placement Center
Rosemary Bedoya,* Career Planning Counselor, CHC

San Bernardino Community College District
Patricia Mollica, Director of Personnel Services & Employee Relations
Win Carl, Personnel Officer, Retired
Queen Hamilton, Chair, Office Administration, S. B. Valley College

San Bernardino County Personnel Office
Freya Foley,* Personnel Analyst

California State Employment Development Department
Roberta Giles, Job Development Specialist

City of Redlands Personnel Office
Leona Terry, Personnel Manager

Redlands Employment Agency
Deborah L. Keys, Temporary & Clerical Division Manager

University of Redlands
Debra L. Campbell, Employment Coordinator

California State University, San Bernardino
Dee Thomas, Training Coordinator
Sandra Rich, Personnel Management Specialist

University of California, Riverside
Marilyn Voce, Manager--Compensation, Training, and Employment

Riverside City College
May Paquette, Associate Professor, Office Administration

Redlands Unified School District
Monroe Petersen, Director of Personnel
Patricia Schuermann, Teacher, Business Office Procedures

Yucaipa Joint Unified School District
Judy Bryld,* Assistant Superintendent, Personnel/Administrative Services

San Bernardino City Unified School District
Larry Glick, Classified Personnel Director

* Participated in the survey in a dual capacity but completed only one questionnaire

QUESTIONNAIRE PARTICIPANTS - Page 2

Redlands Chamber of Commerce
Diane Clark, Executive Vice President

Yucaipa Chamber of Commerce
Gloria Mason, Executive Secretary

U. S. Air Force, Norton Air Force Base
Lisa Markwick, Civilian Personnel Office, EE & Staffing Specialist

TRW Defense Systems Group
Allen E. Brett, Head, Operational A & CO, Deployment Engineering

Redlands Community Hospital
Deannah Winslow, Personnel

Loma Linda University Medical Center
Leah S. Pamintuan, Personnel Assistant

Veterans Administration Medical Center
Beverly A. Doherty, Personnel Staffing Specialist

Legal Firms
Law Offices of Bruce C. Atkins, Kathy Atkins, Office Manager
Smith & Brooks, Attorneys at Law, Claudia Brooks, Attorney
Guay P. Wilson, Attorney at Law
Mac Lachlan, Burford & Arias, Attorneys at Law, Susan Wilkinson, Pers. Mgr.
Reid & Hellyer, Professional Corporation, Lois Willis, Office Manager

Insurance Firms
Automobile Club of So. California, David E. Skeeters, District Manager
Blue Cross of California, Wendy Drew, Human Resources
Davis & Graeber Insurance Services, Inc., Ralph Davis, President
New York Life Insurance Co., Ken Hart, General Manager
Dick Pulsifer, Medical & Dental Insurance, Dick Pulsifer, Owner
Bill Solberg Insurance, Bill Solberg, Owner

Harris' Department Store
Betty Crosby, General Manager

SYNATEK, A Division of Dave Tucker and Associates, Inc.
Ron Barile, Vice President/Chief Operative Officer

San Bernardino County Housing Authority
George F. Hoffman, Housing Manager

Secretaries
Marion Conley, Executive Secretary, CHC
Cheryl Cox, Secretary II, CHC
Thelma Knea, Secretary to the President, SBVC
Kathy Newton, Administrative Secretary, Yucaipa Unified School District

RESPONSES TO QUESTIONNAIRE

I. Please evaluate the following skills or qualities for the position of CLERK-TYPIST, utilizing the following scale:

1 - Required 2 - Desired 3 - Unimportant

1	2	3	
7	15	26	1. Administrative Ability
24	21	3	2. Appearance
1	17	30	3. Bilingual Proficiency
34	13	1	4. Communication Skills
28	15	5	5. Confidential
46	2	0	6. Filing/Typing/General Office Skills
20	26	2	7. Initiative/Self-Starter
32	16	0	8. Interpersonal Skills
9	29	10	9. Math Proficiency
23	24	1	10. Organizational Ability
21	27	0	11. Personality
18	27	3	12. Secretarial Skills
42	6	0	13. Spelling/Grammar
0	6	42	14. Supervisory Ability
42	6	0	15. Telephone Skills
18	28	2	16. Word Processing Skills
11	33	4	17. Writing Skills

The employers who do not employ clerk-typists did not respond to this question. Those who do ranked the top ten skills and qualities as either required or desired as follows:

1. Personality
2. Filing/Typing/General Office Skills
3. Interpersonal Skills
4. Telephone Skills
5. Spelling/Grammar
6. Communication Skills
7. Organizational Ability
8. Initiative/Self-Starter
9 Word Processing Skills
10. Secretarial Skills

A majority of the respondents saw administrative ability, bilingual proficiency, and supervisory ability as unimportant skills for the clerk-typist position.

RESPONSES TO QUESTIONNAIRE - Page 2

II. Please evaluate the following skills or qualities for the position of SECRETARY, utilizing the following scale:

1 - Required 2 - Desired 3 - Unimportant

1	2	3	
25	25	0	1. Administrative Ability
32	16	2	2. Appearance
1	19	29	3. Bilingual Proficiency
45	5	0	4. Communication Skills
47	2	1	5. Confidential
46	4	0	6. Filing/Typing/General Office Skills
40	9	1	7. Initiative/Self-Starter
42	7	1	8. Interpersonal Skills
16	31	3	9. Math Proficiency
44	6	0	10. Organizational Ability
36	13	1	11. Personality
46	4	0	12. Secretarial Skills
26	13	11	a. Machine Transcription
26	17	7	b. Shorthand
46	4	0	13. Spelling/Grammar
15	26	9	14. Supervisory Ability
48	2	0	15. Telephone Skills
31	19	0	16. Word Processing Skills
35	15	0	17. Writing Skills

Secretarial requirements differ sharply from those for clerk-typist. The basic skills are still required, but employers expect their secretaries to have administrative skills and the qualities needed to manage the office. The most important skills that are required or desired are listed below:

1. Administrative Ability
2. Communication Skills
3. Filing/Typing/General Office Skills
4. Organizational Ability
5. Secretarial Skills
6. Spelling/Grammar
7. Telephone Skills
8. Word Processing Skills
9. Writing Skills
10. Confidential
11. Initiative/Self-Starter
12. Interpersonal Skills
13. Personality

RESPONSES TO QUESTIONNAIRE - Page 3

III. Based on your experience in dealing with job applicants and employees, how much improvement is needed in the following areas? Please use the following scale:

1 - Major Improvement Needed 2 - Minor Improvement Needed 3 - No Improvement Needed

1	2	3	
26	21	3	1. Ability to write and speak effectively
12	22	16	2. Accuracy in basic arithmetic skills
14	25	11	3. Ability to read and comprehend matter required for the job
10	25	15	4. Ability to work with others
14	24	12	5. Ability to adapt to or cope with change
11	24	15	6. Willingness to learn new job skills
13	33	4	7. Ability to follow instructions or take suggestions
16	30	4	8. Work Habits
20	23	7	9. Responsibility and Dependability
10	28	12	10. Loyalty to Company and Employer
21	23	6	11. Concern for productivity
26	19	5	12. Time Management
17	22	11	13. Ambition/Motivation/Desire to get ahead
28	13	9	14. Pride in quality of work
11	22	17	15. Skill in operating equipment associated with the job
18	27	5	16. Ability to work under pressure
20	19	11	17. Willingness to start at the bottom and work up
17	22	11	18. Creativity/Originality

Respondents identified three areas where major improvement is needed: ability to write and speak effectively, time management, and pride in quality of work. Minor improvement is needed in the ability to follow instructions or take suggestions, work habits, and loyalty to company and employer. When major and minor improvement needed are combined, the list of needs changes as follows:

1. Ability to write and speak effectively
2. Ability to follow instructions or take suggestions
3. Work Habits
4. Time Management
5. Ability to work under pressure
6. Concern for productivity
7. Responsibility and Dependability
8. Pride in quality of work
9. Ability to read and comprehend matter required for the job
10. Creativity/Originality
11. Ambition/Motivation/Desire to get ahead
12. Willingness to start at the bottom and work up

RESPONSES TO QUESTIONNAIRE - Page 4

IV. Other than possible production cutbacks, which of the following do you consider to be the <u>three leading causes</u> of employees being terminated? Please use the following scale:

1 - Leading Cause 2 - Second Leading Cause 3 - Third Leading Cause

1	2	3	
6	8	4	1. Absenteeism
0	1	1	2. Tardiness
7	8	3	3. Inability to get along with co-workers
1	1	4	4. Does not follow instructions
1	5	2	5. Too slow in carrying out assigned job tasks
0	0	3	6. Lack of maturity
2	0	1	7. Continuously argues with supervisor or employer
4	4	3	8. Lack of interest in job
2	3	3	9. Lack of initiative
4	3	5	10. Continuously makes costly mistakes
2	1	2	11. Shows an unwillingness to learn

The summary for this question was restricted to those who responded with only three (3) answers, which represents thirty-five (35) out of fifty (50) respondents. The totals, therefore, will not represent all fifty participants. The leading causes for termination are the following:

1. Absenteeism
2. Inability to get along with co-workers
3. Continuously makes costly mistakes
4. Lack of interest in job
5. Too slow in carrying out assigned job tasks
6. Lack of initiative
7. Does not follow instructions
8. Shows an unwillingness to learn
9. Lack of maturity
10. Continuously argues with supervisor or employer
11. Tardiness

The "other" causes for terminating employees are listed below:

1. Voluntary termination
2. Gossip--more interested in other people's jobs
3. Inability to perform diversified tasks effectively
4. Any one item [of the 11] could be a cause for termination
5. Personal problems interfere with work
6. Poor performance (quality of work)
7. Theft or dishonesty
8. Drugs or alcohol
9. Medical Problems

RESPONSES TO QUESTIONNAIRE - Page 5

V. What three sources does your firm rely on most heavily to obtain employees? Please use the following scale:

1 - Greatest Reliance 2 - Second Greatest Reliance 3 - Third Greatest Reliance

1	2	3	
22	11	5	1. Newspaper Want Ads
2	3	9	2. Federal Employment Office
1	2	10	3. State Employment Office
2	3	8	4. County Employment Office
1	3	9	5. City Employment Office
0	3	10	6. Private Employment Agencies
9	14	6	7. Contact with schools and colleges
19	9	5	8. Word-of-Mouth
10	4	15	9. People making application for work without prior knowledge of openings

The responses to this question clearly indicate the four greatest sources for obtaining employees: newspaper want ads, word-of-mouth, people making application for work without prior knowledge of openings, and contact with schools and colleges in the area. The rank order for all sources is listed below:

1. Newspaper Want Ads
2. Contact with schools and colleges
3. People making application for work without prior knowledge of openings
4. Word-or-Mouth
5. Federal Employment Office
6. State Employment Office
7. County Employment Office
8. City Employment Office
9. Private Employment Agencies

The "other" sources for obtaining employees are listed below:

1. Bulletin mailings
2. On-campus announcements
3. In-house job announcements
4. Contacting people at other businesses
5. Legal Secretaries' association
6. Recruiting
7. Referrals by employees
8. Internal promotion
9. Funded positions
10. Telephone recordings of job information

VI. In the space provided, please cite any criticisms, suggestions, and recommendations that you have for ways in which public institutions, such as community colleges, can improve their training programs in clerical skills.

The following comments are responses to this request.

1. Written and verbal communication skills seem to represent a major problem for students coming out of high schools and colleges. If they learn how to write English, they will learn how to speak it. Most of our clerical positions are for the credit office. If we have people who can follow instructions, we can teach them the specifics of the job. Behind the scene, clerical jobs require the ability to read data and be able to interpret information, follow verbal instructions, and write clearly. Observation: A lack of loyalty and sense of urgency towards their responsibilities seem to permeate the thinking of so many young people we see today.

2. Stress people skills, grooming, how to get along in the work world. Technical skills are good, for the most part.

3. Students must be willing to start at the bottom and work up.

4. One item that distresses me the most is an intangible and, I guess, is best described as the old "work ethic." It is extremely hard to find dedicated, loyal employees who are willing to give a little extra; everyone wants to start at the top. Communication skills, especially business writing, are sorely needed. Work habits involving tardiness and absenteeism are a problem.

It would be very helpful for the college to conduct a survey in the San Bernardino Metro area to determine what types of office automation equipment are actually being used and then gear their training around that equipment.

5. Job Needs/Requirements: Coding Clerks (Medical) for hospitals, clinics and private offices; Billing Clerks (Insurance) who are trained in Champus and Medicare laws/rules pertaining to the Federal Health and private insurance system.

6. Offer an internship program whereby students could experience the practical application of their secretarial skills and training while working for local community businesses.

7. Stress the importance of having good typing skills! Shorthand skills are either required or highly desirable for higher level clerical positions. It is VERY difficult to recruit applicants with the ability to take and transcribe shorthand.

8. I've always felt strongly that reception and telephone skills are most important in an office setting, and therefore, training should be provided in that specific area.

Graduates of CHC Secretarial/Clerical Certificate and Degree programs appear to be of extremely high caliber, and I've always felt secure in referring them as potential candidates for employment.

Comments (continued)

9. Community colleges could take advantage of the many local seminars offered by professional training companies, such as the following: "Business Writing Skills," "Time Management," computer courses, "Being an Effective Supervisor," "How to be a Better Clerical Support Person." Many of these are offered at reasonable rates, i.e., $49 a day for each person.

Or--community colleges have excellent resources in the talent of their own faculty members. Recruit various faculty members to offer presentations of 1-2 hours duration on pertinent topics to clerical personnel. Or--offer lunchtime seminars of 45 minutes to 1 hour for clerical staff that would not detract from their 8-hour workday.

10. Students should be encouraged to continue their education so that they can adjust to changes in job requirements. Job preparation should be required in all Vocational Education classes. A major need for students is the ability to get along with others; this must be included in training for any job. Increase and stress the importance of Office Experience classes.

The students that go through the Office Administration program are usually great referrals. I have no complaints.

11. In addition to the basic secretarial skills, most employers in small firms or offices require their secretaries to be an integral part of the firm in dealing with the public and in preventing problems that may occur. Personal initiative and training to accept responsibility within the framework of the office will be required for real success in the job.

12. The most important tools of a secretary, particularly a legal secretary, are still the abilities to read, write, and spell well and a good understanding of English grammar. Many job applicants lack even these simple basics.

Training programs should pay more attention to helping the student develop such skills.

13. More emphasis should be placed on dealing with people, i.e., co-workers, clients, supervisors, etc., both face to face and on the telephone.

14. Community colleges and business schools must emphasize the importance of basic education (spelling, grammar, written communication skills) in addition to learning skills such as computers and/or word processing. The job of a legal secretary is much more than transcribing and answering telephones. Legal secretaries need to be multi-talented. Our firm does not have the time or resources to teach someone basic skills. We need intelligent, highly competent individuals who already possess the basic skills necessary to perform the functions of a legal secretary.

15. Marketing is important! I did not know that CHC had such a program or I might have called you when I had my last opening. In teaching marketing, you might encourage your students to send excellent resumes to 10 companies a month. I am always impressed to receive a resume, and they always get a call. I usually help those people find a job even if I'm not hiring.

Verbal skills are frequently very important in secretaries as they conduct a lot of interviews and phone work. I would suggest every candidate take a speech class.

Comments (continued)

16. There is a segment of the population interested in more intensive, shorter courses--also review courses for those in the field.

17. For the basic employee--clerk, typist, receptionist--the high schools and community colleges must require decent proficiency in the "3-R" type thing, spelling, typing, and arithmetic. Most of our applicants fail our basic typing and spelling tests.

For people seeking a better position--customer service representative--they need to be better versed in office skills. This includes, but is not limited to, filing procedures, business letter and memo writing, telephone etiquette, etc. But they still need to SPELL better.

18. If technically competent, they seem to lack good work habits and a knowledge about the world of work. They need more exposure to work environments.

They need to be aware of the need for high productivity and good interpersonal relations. They seem to need more training in reading, writing, grammar, and steno skills.

Most secretarial positions require shorthand. Too few trained secretaries have this skill.

19. We did not address those items in your questionnaire which are considered to be "non-merit" factors. Federal regulations, which direct our personnel system in the Federal Government, allow for only those knowledges, skills and/or abilities which are job related to be considered during the qualification and selection process.

20. Too many people are looking for a "quick fix." They aren't willing to devote the time and work necessary for jobs that require more than entry-level skills. We have a hard time filling positions that require shorthand, even though the opportunities for higher salaries and better positions are much greater with those skills. A secretary, with shorthand skills, can advance to an administrative assistant position; a secretary without these skills cannot.

21. To try to sum up all the entire list of questions would be difficult. I can say, however, that personal communication skills are the most important of all learned skills as it relates to our business. We have the opportunity to train employees in many areas, but without these basic verbal and writing skills, the task becomes difficult.

22. The secretary is often the first person to be seen in the office. This will be considered a more responsible level with a high degree of responsibility and less supervision.

23. The areas of greatest need for improvement are loyalty to company and employer, responsibility and dependability, and ability to work with others.

24. The most important asset a person can have for work in any field is a good attitude. A desire to do a reasonably good job will often overcome the lack of training and many times the lack of experience.

EVALUATION AND RECOMMENDATIONS

The major areas in which potential employers need more training are communication skills and interpersonal relations. The courses that include this training are already a part of the Office Administration curriculum, and the results of this survey suggest that they should always be required as a part of the curriculum. Students who are enrolled in a certificate program are required to take Business English, which focuses on English usage, both written and spoken. In Business Communications, another required course for the certificate, emphasis is placed on writing business letters, memoranda, and other forms of business communication that are a major responsibility of the secretary. Training also is given in oral communication, which respondents indicate is particularly crucial in the use of the telephone.

Human relations emerge as a major consideration in the hiring and retention of employees, both for the clerk-typist and the secretarial position. Students need to recognize the necessity of getting along with their peers as well as their employers. By presenting a variety of problems in actual office situations (Human Relations in the Office Environment), students can anticipate the difficulties that they might encounter and be prepared to deal with them intelligently. In this connection, students must be helped to develop good work habits, notably in such office areas of complaint as tardiness and absenteeism. Finally, students must recognize that any job worth keeping is worth working at with diligence and a keen sense of responsibility. As one employer noted: "The most important asset a person can have for work in any field is a good attitude. A desire to do a reasonably good job will often overcome the lack of training and many times the lack of experience."

From conversations with employers in both the private and public sectors, as well as from the questionnaires themselves, two facts of major relevance emerge: (1) the Inland Empire hires a great many persons trained in office skills and procedures; and, (2) Crafton Hills College has an excellent opportunity to be a major provider of students who are prepared for this large market. To take advantage of this opportunity, students need to be informed as well as advised concerning those qualifications that employers

rank as most desirable and of those deficiencies chiefly responsible for the termination of employment. At the same time, employers need to be kept regularly informed about the Office Administration Program, and that Program needs to be adaptable to the changing requirements of the job market. One unintended biproduct of this survey has been informing some employers, who had not known previously, of the kind of office training available at Crafton Hills College.

In connection with these marketing needs, among both potential students and their potential employers, it is vital that the Office Administration Program have a second full-time faculty member. Up until 1987, the Program had two full-time faculty members; the enrollment growth this year and projected for the next several years demands a return to that level as an absolute minimum. Part-time teachers do not get involved in student advising and counseling; neither are they able to keep lines of communication open to employers throughout the Inland Empire. In addition to all this, however, the instructional needs themselves require a minimum of two full-time faculty. The economy of hiring many part-time persons is a false economy, cheating the students of a competent adviser and job placement counselor, and weakening the curricular program over the long term. This recommendation, therefore, addresses the most urgent and pressing need of the Office Administration Program.

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